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Approved by:

LaVerne E. Brabant

US Consulate General, Shanghai

Prepared by:

Peter Moustakerski

Report Highlights:

In addition to reducing tariffs, China's WTO accession is expected to benefit U.S. food exporters by accelerating development of the country's vast distribution and logistics industries. The establishment of efficient, nationwide networks will allow deeper and more transparent penetration of imported goods. On the demand side, WTO accession is expected to create new markets for high-value food and agricultural products as rising disposable income levels fuel an ongoing nationwide consumer revolution.

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SECTION I. Market Overview

I.1. Economic Situation

Although no longer reporting the double-digit growth rates of the late-1980s and early-1990s, China maintains one of the fastest growing economies in the world. Last year, official GDP growth reached 7.3%, even as much of the world suffered recession. Even during the Asian Financial Crisis of 1997-98, the country was able to keep up this rate, thanks largely to having an inconvertible currency, an enormous stockpile of foreign exchange, and large-scale deficit spending. Economic growth is expected to stay at the 7-8% level for the next several years. The country will be helped by its strong export business (in 2001, it accounted for 4.3% of the world's exports) and persistent foreign direct investment, especially in the wake of WTO accession.

The country's entry to the WTO will open a number of sectors over the next several years, including finance, insurance, automotive, telecoms and tourism, to much greater foreign participation. The most important developments for U.S. food exporters may be the opening of the distribution and logistics sectors (which should encourage the establishment of efficient, nationwide networks and allow far better penetration of foreign goods); the opening of the retail sector (which will strengthen chain stores and franchises); the phase-out of agricultural subsidies (which will force Chinese farmers to compete with foreign producers); and the reduction of tariffs for a wide range of agricultural products, from wine to citrus fruit, from 22% to an average of 17.5%.

I.2. Demographic Developments

After decades of restricting peasant migration into China's cities, the central government has embraced a policy of urbanization, which it hopes will increase consumer spending on everything from homes to electronics to recreation. Indeed the robust growth of urban consumption has accelerated China's widening urban-rural development gap. The majority of people still live in the countryside—as of 2000, some 800 million were rural dwellers and 450 million urbanites. But the trend is clear. In 2000, population growth reached 9.9% in Beijing, 13.6% in Shanghai, and 18.8% in Guangdong province. Cities with the wealthiest and most cosmopolitan consumers are concentrated on the Eastern seaboard, though some inland cities—such as Xian, Chongqing and Chengdu—are making progress, becoming of increasing interest to American exporters.

I.3. Consumer Buying Habits

Private consumption is estimated to have grown by 5% in 2001, to an average of US\$420 per person. Annual consumption growth declined from 2000 as a result of lower export demand (especially from the U.S.) and growing unemployment. The Beijing government has done its part to boost spending by instituting longer national holidays, raising pay for civil servants, and encouraging home-ownership and private car purchases. These efforts, along with the expected recovery of the U.S. economy in 2002 and China's recent entry to the WTO, are likely to revive consumer spending.

While Chinese tend to be savers and to make purchasing decisions carefully, rising levels of disposable income are fostering an increasingly conspicuous consumer culture. People are willing to spend more on education and medical care, as well as luxury goods, gift-giving and entertainment. American companies that supply hotels and restaurants, and those exporting high-value foods (seafood, beef and wine, for example) and gift-oriented products (fresh fruit, chocolate, and candy, for example) are especially well positioned to benefit from these trends in consumer spending. The one-child policy, which is strictly enforced in the cities, has also contributed to the rise in disposable income and to a focus on children in spending decisions. Food and agricultural importers also stand to benefit from greater health-consciousness and awareness of food safety. Chinese consumers increasingly accept comparatively expensive importer food and agricultural products as higher quality, safer, more stylish, and worth the money.

I.4. Consumer Foods Market Size and Growth

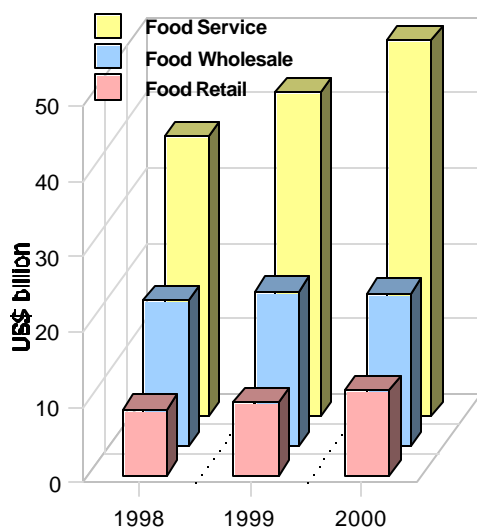


Figure 2. China's Consumer Food Market Size, 1998-2000

The market for consumer foods and beverages in China continues to develop and grow at an impressive pace. In addition to rising living standards of China's burgeoning middle class, the country's relatively stable economic growth, strong foreign trade balance and recent entry into the WTO are fueling consumer demand for more diverse and higher-quality foods. In 2000 according to official Chinese data, the aggregate market, including wholesale, retail and food service, for consumer foods and beverages (including imported ones, but excluding tobacco and liquor) reached US\$ 81.3 billion, up 11% over the previous year.

Given China's gourmand culture and the tradition of

lavish family and business banquets, it comes as no surprise that over 60% of this market is attributed to the food service sector, which has been growing at over 15% for the past three years. Food retail sales were another fast-growing segment at US\$11.3 billion in 2000, up 14% year on year. The balance of US\$ 20.2 billion is attributed to food wholesale trade, the majority of which represented secondary wholesaling (which has remained relatively flat over recent years due to consolidation in the distribution and wholesale sectors) and purchases by the food processing industry.

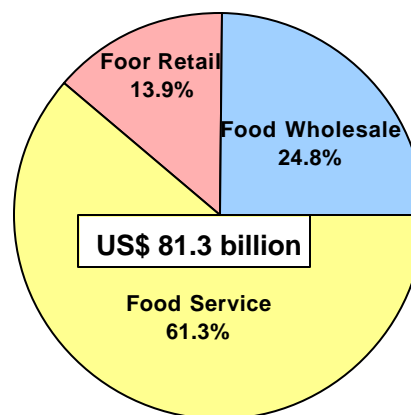


Figure 3. China's Consumer Food Market Pie, 2000

I.5. The Market for U.S. Products

The prospects for U.S. consumer food and beverage products in the Chinese market continue to be

strong in all three major sectors: food service, food retail and food processing. U.S. exports of consumer-oriented foods and agricultural products to China set an all-time record in 2001, reaching US\$ 285 million. Continued growth in the HRI sector has fueled demand for quality U.S. products used by hotels and restaurants in both Western and traditional Chinese cuisine preparations. U.S. direct exports to China of red meats and salmon have almost doubled in 2001. As a result of China's retail revolution and the advent of Western-style hypermarkets and convenience stores, sales of U.S. fresh fruit, tree nuts, snack foods, cereals, and pet foods have soared steadily in recent years. China's modernizing food processing industry has also demanded more quality ingredients, resulting in strong exports to China of U.S. dairy products, processed fruit, vegetables, and poultry products.

The Sino-U.S. Agricultural Cooperation Agreement of 1999 resolved long-standing disputes over U.S. exports of key agricultural commodities (particularly U.S. wheat, meats and citrus), and resulted in strong sales in 2000 and 2001. China's accession to the WTO is expected to bring import tariffs on U.S. imports down, and will allow foreign investment in the country's distribution industry. Many U.S. consumer-oriented products are already entering China directly via legitimate import channels, abandoning the risky and unreliable gray channels through Hong Kong and South China that were the main gateway to the Chinese market in the 1990s.

I.6. Advantages and Challenges Facing U.S. Suppliers of Food Products to China

Advantages	Challenges
Consumers currently spend almost half of their disposable income on food and beverage products.	China is a very price-sensitive market, and imported products have difficulty competing with local ones.
Incomes are rising, and tariff reductions under WTO will make foreign food products more affordable.	Even with lower duties, imported food and beverages will remain out of reach for most Chinese consumers.
Imported products are gaining favor among the wealthier, cosmopolitan consumers in coastal cities.	The majority of consumers are inland, where incomes are lower and penetration of foreign products is low.
TV and other media have brought the outside world to ordinary Chinese, and curiosity in American products has surged.	While open to novelty in general, most consumers express strong preference for Chinese food—and local cuisine in particular.
Chinese consumers consider U.S. products to be of high quality.	Awareness of U.S. products and brands among Chinese consumers is still relatively low.
Overseas retail and fast-food chains increase the exposure of U.S. brands and food products.	Chains source almost entirely from local producers to reduce costs and to meet government requirements.
Some U.S. brands, such as Coca-Cola, M&Ms and Budweiser, have successfully penetrated inland and rural markets in China.	International brands that have achieved wide recognition are also produced locally, and are therefore cheaper than imports.
Food products are a preferred gift. Superior packaging and quality of U.S. products attracts gift buyers. There is more spending on children and young people, who like novel and trendy products.	There is little brand loyalty for foreign products, and fads wear off fast. Local manufacturers are able to quickly replicate popular foreign products, and produce them for a fraction of the cost.
Food is an essential part of Chinese culture and social life. No expense is spared for bountiful and quality food at family or business banquets or celebrations.	U.S. seafood, meat, and fresh produce must compete with imports from the Asia Pacific. Shipping costs and emphasis on freshness make proximity important.

Improved infrastructure, and the opening of the distribution sector under WTO, will improve frozen and fresh food distribution chains.	China will remain a highly fragmented market, with weak transport networks and substantial local trade barriers. Nationwide distribution is a long way off.
Under the WTO regulations, foreign traders and investors are expected to have greater market access and eventually may not be subject to double-standards.	China's legal system is undeveloped and enforcement is often erratic and biased. Corruption and local protectionism will remain problematic. Double-standards, including those that benefitted foreign investors, will eventually be eliminated.
Government crack-down on counterfeiting is addressing the spread of fake products in the market. Consumer awareness of counterfeiting is increasing.	Counterfeiting is still rife, and foreign companies spend considerable resources to protect their brands. Consumer distrust has already damaged some brands
Chinese distributors, particularly private companies, are interested in distributing quality U.S. products and eager to work with U.S. exporters.	Chinese distributors have difficulty obtaining financing. U.S. traders are unfamiliar with Chinese business practices, which rely more on relationships and less on contracts.

SECTION II. Exporter Business Tips

II.1. Local Business Customs

Being unprepared for the cultural and practical aspects of doing business in China can (and often does) cost U.S. exporters dearly. Chinese society—historically and today—sports a vibrant mercantile culture of its own, where business efficiency, opportunity and profits are revered as much as in the West. But there are important subtle differences that could make or break an otherwise economically rational business deal. U.S. exporters should spend the extra time to acquaint themselves with the basics of Chinese business etiquette and come prepared to recognize and tackle the cultural challenges facing foreigners doing business in China.

To help U.S. exporters gain an overall understanding of the cultural aspects of doing business with their Chinese counterparts, ATO Shanghai has prepared several reports that introduce **Chinese Business Etiquette** and the challenges of **Business Travel in China**. For a detailed look into these useful topics, please access ATO Shanghai reports on Chinese Business Etiquette (report number CH0815) and Business Travel in China (report number CH9818), available on the ATO Shanghai website www.atoshanghai.org and the FAS website www.fas.usda.gov.

II.2. Consumer Tastes

Consumer tastes in China vary considerably from region to region, and are constantly evolving under the influence of Asian and Western tastes filtering into Chinese society through commerce and cultural exchanges. In general, tastes in China favor Asian products, such as from Hong Kong, Japan and Taiwan: e.g. dim sum fast-food, sushi bars, milk-tea cafes, one-serve instant noodle meals, canned tea drinks, and snack food flavored with prawn, green tea or seaweed. This reflects both the cultural proximity Asian products enjoy, as well as their relatively early market entry that has given Asian

companies a slight marketing edge. However, Chinese consumers have proven to be open-minded and willing to experiment with new tastes and products, including many Western ones. Many popular myths of the past, such as the Chinese assumed aversion to (the Western tastes of) coffee or chocolate, have long been disproved. Today, Chinese consumers are being bombarded with all kinds of products, flavors, marketing concepts and advertisements, and they are constantly adapting and modernizing their tastes and preferences.

Consumer preferences vary largely from product to product, and there are few fixed rules or trends. The following are just some of the general patterns with regard to Chinese consumer tastes and preferences:

- C Chinese prefer fresh meats and produce to canned and processed ones;
- C Chinese prefer smaller size packages to “jumbo packs” despite the promise of long-term savings;
- C In the case of snacks or candies, Chinese like to see the actual product inside the packaging, so including a transparent “window” on the package would be preferred to an entirely opaque package;
- C Chinese pay considerable attention to the attractiveness of the package, taking its size, colors and designs into careful consideration;
- C Chinese are attracted to big and established brand names, which they consider a proof of authenticity and superior quality.

However, before committing considerable resources to a certain product, concept, or flavor in the Chinese market, U.S. exporters are strongly advised to invest in targeted market research and taste testing. Taking the responses and preferences of Chinese consumers for granted (without sufficient direct consumer research) is a common reason for failure of imported food and beverage products marketed in China.

II.3. Food Regulations

In the past few years, the Chinese government has promulgated a number of laws, regulations and standards that now comprise the country’s regulatory infrastructure governing the production, marketing and distribution of food and agricultural products, including imported ones. As sophistication and transparency increase among Chinese government agencies, this regulatory framework will be enforced with increasing vigor. U.S. exporters are advised to carefully study all relevant Chinese laws and standards that pertain to their field of business, and to make concerted and consistent efforts to be in compliance with all legal requirements.

In an effort to help U.S. exporters achieve and maintain this level of knowledge, FAS China has prepared a series of unofficial translations into English of all relevant Chinese laws, regulations and standards that govern the manufacturing, marketing and distribution of food and beverage products in China. Collectively, these are known as the **China food and agricultural import regulations and standards** report (or FAIRS report). The China FAIRS Report currently contains translations of over 30 Chinese official documents—from the country’s food law (Food Hygiene Law), to food labeling standards, to food additive regulations, to food and agriculture-related laws (Forestry Law, Fishery

Law, etc.), to specific standards and regulations (e.g. GMO standards, organic standards etc.).

To access the **China FAIRS Report**, please refer to the China FAIRS Report Working Index (FAS China report number CH1041), which is available on the ATO Shanghai website www.atoshanghai.org and the FAS website www.fas.usda.gov. The Working Index lists the report numbers of all individual translations of specific laws, regulations and standards.

II.4. Import and Inspection Procedures

As is the case with China's laws, regulations and standards, the procedures for the importation and inspection of food, beverages and other agricultural products are becoming more clear-cut and transparent. This is not say, however, that importing food and beverage products into China is in any way becoming an easy or simple process. In fact, the processes involved are so complicated, time-consuming and costly, that U.S. exporters are advised to procure the services of professional import and logistics agents in order to ensure efficiency and compliance. U.S. exporters and their representatives in China need to secure a number of import permits and hygiene certificates, and their products must undergo several stages of inspection and verification.

For a detailed, step-by-step account of the **import procedures** that a typical food product needs to clear upon importation into China, please see FAS China report number CH1067, available on the ATO Shanghai website www.atoshanghai.org and the FAS website www.fas.usda.gov.

SECTION III. Market Sector Structure and Trends

III.1. Food Retail

China's food retail sector has experienced remarkable growth and transformation over the past 10 years. In the early 1990's, wet markets and non-staple food stores were dominant, but in the past five years most have been replaced by supermarket and convenience-store chains. This transition has been rapid and evident in larger cities but the trend is unmistakably present for the whole of China. In just a few years, the arrival of overseas-invested hypermarkets, such as Carrefour and Wal-Mart, has further changed the Chinese retail sector. This has forced traditional supermarket chains to restructure and consolidate in order to stay competitive. Frozen and chilled product sections are rapidly developing as a basic component of most supermarkets in China, and availability of fresh fruit and vegetables outside traditional wet markets continues to expand.

For a detailed look at China's **food retail sector** and an in-depth analysis of the challenges and opportunities it presents to U.S. exporters, please see ATO Shanghai's Retail Food Sector Report (report number CH1810), available on the ATO Shanghai website www.atoshanghai.org and the FAS website www.fas.usda.gov.

III.2. HRI / Food Service

China's Hotel, Restaurant, and Institutional (HRI) sector is one of the most dynamic areas of the

economy. The restaurant sub-sector is experiencing explosive growth, with total national sales of US\$ 49.8 billion in 2000. From trendy, upscale, fine dining to a quick bite beside a dilapidated dumpling cart, China's urban HRI sector literally has it all. The restaurant sub-sector accounts for more than 60% of the HRI industry total market. This sub-sector includes family style restaurants, fast-food chains, and other types of restaurants, such as dim sum shops, noodle shops, and tea houses. With nearly 50% private ownership, these three segments are the most active and fastest growing parts of the food service market. With a workforce of more than 4 million and 2 million students, the institutional sub-sector follows with just over 28% market share, but this sub-sector is shrinking as unemployment rises due to national restructuring of state-owned enterprises. Hotel food service business has declined as well in recent years due to increased competition from stand-alone restaurants. The HRI sector, however, continues its cycle of dynamic development, fueled by a surge in foreign-investor interest in post-WTO China and by the Chinese consumers' enthusiasm for innovation and appetite for quality foods.

For more in-depth look at China's **food service sector**, please see ATO Shanghai's Hotel, Restaurant, and Institutional (HRI) Sector Report (report number CH9836), available on the ATO Shanghai website www.atoshanghai.org and the FAS website www.fas.usda.gov.

III.3. Food Processing

The Chinese food processing industry, while less than two decades young, is now one of the fastest growing segments of the economy, and due to its late inception, one of the most modern industries in China. According to official Beijing statistics, China's food processing industry has grown an average 14% by output value since 1981. As a result of the enhanced value of processed food, the Chinese government predicts the industry will grow at an 18% annual rate in the future. Currently, only about 20-25% of China's food production is processed, compared to 80% in developed countries. International companies play a leading role in the sector though further progress is hampered by backward agriculture and poor logistical infrastructure. Many of these companies already play a leading role in the food processing industry, and WTO entry is expected to accelerate market and legal reforms that will facilitate market entry and competition.

For an in-depth look at the structure of and trends in China's **food processing sector**, please see ATO Shanghai's Food Processing Sector Report (report number CH2809), available on the ATO Shanghai website www.atoshanghai.org and the FAS website www.fas.usda.gov.

SECTION IV. Best High-Value Product Prospects

	Top U.S. Consumer-Oriented Food Exports to China, 2001	Value (US\$1,000s)
1	Red Meats, Fresh/Chilled/Frozen	40,567
2	Poultry Meat	38,905
3	Dairy Products	36,133
4	Processed Fruit & Vegetables	34,058

5	Fresh Fruit	29,073
6	Snack Foods (Excluding Nuts)	18,208
7	Salmon, Whole Or Eviscerated	16,304
8	Crab & Crabmeat	15,553
9	Tree Nuts	10,164
10	Surimi (Fish Paste)	6,564
11	Roe & Urchin (Fish Eggs)	6,429
12	Eggs & Products	5,236
13	Pet Foods (Dog & Cat Food)	3,390
14	Fresh Vegetables	3,135
15	Wine & Beer	2,697

Source: 2001 BICO Report—U.S. Exports of Agricultural, Fish & Forestry Products to China, People's Republic of.

SECTION V. Key Contacts and Further Information

For a list of **Chinese government regulatory agencies** in Beijing, Shanghai and Guangzhou, please see FAS China report number CH1068, available on the ATO Shanghai website www.atoshanghai.org and the FAS website www.fas.usda.gov.

For a list of **import specialists** in Beijing, Shanghai and Guangzhou, please see FAS China report number CH1069, available on the ATO Shanghai website www.atoshanghai.org and the FAS website www.fas.usda.gov.

For further information, please contact the ATO Shanghai office at the contacts below, or visit the ATO Shanghai website www.atoshanghai.org to learn about upcoming events and activities. Reports from ATO Shanghai and other ATO offices around the world are also available from the FAS website www.fas.usda.gov.

LaVerne E. Brabant, Director
 U.S. Agricultural Trade Office, Shanghai
 Shanghai Center, Suite 331
 1376 Nanjing West Road
 Shanghai 200040, China
 Phone: (86-21) 6279-8622
 Fax: (86-21) 6279-8336
 E-mail: atos@public.sta.net.cn or atoshanghai@fas.usda.gov
 Website: www.atoshanghai.org

APPENDIX I. Statistics

Table A: Key Trade & Demographic Information

Agricultural Imports From All Countries (\$Mil) / U.S. Market Share (%) ¹	\$9,945 / 25%
Consumer Food Imports From All Countries (\$Mil) / U.S. Market Share (%) ¹	\$1,948 / 33%
Edible Fishery Imports From All Countries (\$Mil) / U.S. Market Share (%) ^{1/}	\$1,217 / 7%
Total Population (Millions) / Annual Growth Rate (%)	1,266 / 1.07%
Urban Population (Millions) / Annual Growth Rate (%)	458 / 5.3%
Number of Major Metropolitan Areas ²	40
Size of the Middle Class (Millions) / Growth Rate (%) ³	110 / n/a
Per Capita Gross Domestic Product (U.S. Dollars)	\$855.35
Unemployment Rate (%) ⁴	3.1%
Per Capita Food Expenditures (U.S. Dollars)	\$236.65
Percent of Female Population Employed ⁵	28.4%
Exchange Rate (US\$1 = X.X local currency)	8.275

Source: China Statistical Yearbook 2001

Footnotes:

- 1) UNTrade database, Import Market Share BICO 3-Yr format.
- 2) Population in excess of 1,000,000.
- 3) Middle Class growth rate not available.
- 4) Official number based upon number of registered unemployed persons in urban areas.
- 5) Percent against total number of women (15 years old or above).

Table B: Consumer Food & Edible Fishery Product Imports

China (Peoples Republic of) Imports of Agriculture, Fish & Forestry Products
(In Millions of Dollars)

	Imports from the World			Imports from the U.S.			U.S. Market Share		
	1998	1999	2000	1998	1999	2000	1998	1999	2000
CONSUMER-ORIENTED PRODUCTS	978	1,491	1,948	291	470	636	30	32	33
Snack Foods (Excl. Nuts)	29	43	64	8	9	16	28	21	25
Breakfast Cereals & Pancake Mix	2	3	3	1	1	1	19	18	17
Red Meats, Fresh/Chilled/Frozen	34	88	156	14	28	45	40	32	29
Red Meats, Prepared/Preserved	2	6	8	1	3	5	16	46	66
Poultry Meat	108	410	481	59	263	374	55	64	78
Dairy Products (Excl. Cheese)	95	168	224	16	23	21	17	14	9
Cheese	1	3	4	1	1	1	6	18	11
Eggs & Products	1	1	10	1	1	2	19	14	15
Fresh Fruit	195	226	318	5	25	41	3	11	13
Fresh Vegetables	6	6	4	4	4	2	77	60	42
Processed Fruit & Vegetables	66	104	122	15	32	48	23	30	39
Fruit & Vegetable Juices	9	13	14	3	3	3	29	24	21
Tree Nuts	41	21	23	7	7	7	16	34	30
Wine & Beer	60	98	121	3	4	3	4	4	2
Nursery Products & Cut Flowers	11	17	21	1	1	1	4	7	7
Pet Foods (Dog & Cat Food)	1	1	1	1	1	1	10	3	9
Other Consumer-Oriented Products	317	284	374	156	67	68	49	24	18
FISH & SEAFOOD PRODUCTS	671	890	1,217	56	55	80	8	6	7
Salmon	20	16	26	4	4	5	19	27	19
Surimi	9	8	12	3	3	6	34	35	47
Crustaceans	96	125	218	11	16	8	12	12	4
Groundfish & Flatfish	342	361	593	32	22	31	9	6	5
Molluscs	55	103	182	1	4	25	0.5	4	14
Other Fishery Products	149	277	186	5	7	5	3	3	3
AGRICULTURAL PRODUCTS TOTAL	7,624	7,128	9,945	1,814	1,636	2,460	24	23	25
AG, FISH & FORESTRY TOTAL	10,259	10,940	14,878	1,995	1,835	2,680	19	17	18

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

Table C: Top 15 Suppliers of Consumer Food & Edible Fishery Products

CONSUMER-ORIENTED PRODUCTS TOTAL - 400				FISH & SEAFOOD PRODUCTS - 700			
Reporting Country:		Import		Reporting Country:		Import	
China (Peoples Republic of)				China (Peoples Republic of)			
Top 15 Ranking				Top 15 Ranking			
	1998	1999	2000		1998	1999	2000
	1000\$	1000\$	1000\$		1000\$	1000\$	1000\$
United States	290,717	470,353	635,982	Russian Federation	276,981	257,727	345,895
New Zealand	31,662	91,231	145,587	Japan	88,147	185,010	136,583
Netherlands	42,552	90,153	128,755	India	15,126	12,191	87,157
Thailand	71,490	91,330	118,154	United States	55,574	55,040	79,753
Japan	75,312	68,438	88,635	Canada	25,677	35,055	77,207
France	29,599	41,401	78,031	Korea, Republic of	38,769	35,390	67,019
Philippines	69,545	49,659	77,112	Norway	8,996	19,468	42,550
Ecuador	65,938	64,569	74,279	Thailand	8,352	10,239	41,787
Canada	22,228	45,451	70,530	Mauritius	620	22,358	29,068
Australia	26,496	41,282	63,897	Spain	15,924	17,405	28,042
Denmark	14,355	25,282	39,934	Taiwan (Estimated)	3,448	8,775	26,983
Ireland	5,605	19,798	35,119	New Zealand	15,105	12,149	26,448
Taiwan (Estimated)	14,833	29,729	32,659	Indonesia	7,736	4,938	23,182
United Kingdom	6,740	30,527	32,200	Argentina	16,857	35,877	17,268
Chile	684	10,119	25,147	Uruguay	514	6,919	14,340
Other	210,003	321,531	301,633	Other	93,264	170,954	173,775
World	977,652	1,490,913	1,947,689	World	671,101	889,508	1,217,062

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office